

# **Community College Development Criteria**

**Bitterroot Valley Community College**

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*Prepared for the Montana Board of Regents*

*Prepared by the Trustees-Elect, Proposed Bitterroot Valley Community College*

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# Introduction

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On May 5, 2020, voters from Corvallis, Darby, Hamilton, Lone Rock, Stevensville, and Victor school districts in Ravalli County, Montana approved, by a 59% majority, a proposal to organize the Bitterroot Valley Community College District. On the same ballot voters also elected the first Board of Trustees to manage and administer the newly proposed district: Janet Woodburn, RAN Pigman, Don Gardner, Gary Carlson, Sue Smith, Linda Doughty, and Marci Smith.<sup>1</sup>

Having met the statutory criteria ([MCA 20-15-201](#)) for establishment of a community college district and pursuant to the prescribed process, the Bitterroot Valley Community College District's Board of Trustees-Elect is submitting the requested information to the Montana Board of Regents. The Trustees-Elect formally request an endorsement and a favorable recommendation from the Board of Regents to the Montana Legislature to officially organize the Bitterroot Valley Community College District.

## Background

The Bitterroot College University of Montana was formed as a program of the University of Montana (UM) following the failure of the Montana Legislature to establish the community college district requested and approved by the voters of Ravalli County in an election held in 2007. The program is funded and administered under the Office of the UM Provost and is not a recognized unit of the Montana University System (MUS), as referenced by Montana Statute [MCA 20-25-201: Units Constituting University System](#). Table 1 provides background to understand the history of efforts to establish the Bitterroot Valley Community College.

## Rationale for Establishment of Bitterroot Valley Community College

Ravalli County residents face the barriers to training inherent in a large, primarily rural geographic area with a diverse employment landscape. In the current economically stressed environment local access to degree and workforce training programs is critical. Workforce training requests by local businesses to train or re-train and re-tool in response to a changing economy, a crisis like Covid-19, or the rapidly changing demographics of the county, cannot be efficiently provided without local program authority, access, and capacity. And, without local access residents face significant program and travel expenses, as well as a time commitment that complicates work and family priorities.

The Montana Board of Regents have acknowledged the need for locally accessible higher education opportunities in Ravalli County with a variety of actions since 2005, by including the Bitterroot College Program in the adoption of the Mission and Vision for State two-year units in 2011, and by renaming the program to Bitterroot College UM in 2012. But the actions have stopped short of officially recognizing Bitterroot College UM as an Official Unit of MUS and have not afforded a measure of autonomy and local administrative oversight.

Even though Bitterroot College UM is not an officially recognized unit of the MUS, it has functioned, as much as possible, as a true college unit, providing students local access to the course work necessary to achieve an Associate of Arts degree or some non-college-credit workforce certifications. However, over the years of operation, the administrative functions and budgets continue to operate as a program of the UM Provost. The funding has remained static in the face of

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<sup>1</sup> [Ravalli County election results](#).

Table 1. Timeline of key events leading to present Bitterroot Valley Community College effort.

<b>2005</b>	Ravalli County stakeholders research workforce training delivery options, determine community college option maximizes programming opportunities
<b>2006</b>	Local stakeholders follow community college district organizing statute; successfully petition local voters to put community college proposal on ballot
<b>2007</b>	Montana Board of Regents (BOR) consents to UM's opening the Hamilton Higher Education Center (HHEC) to provide "access to coursework toward degrees at The University of Montana or another accredited higher education institution, to workforce training, and to college preparation in closer proximity to their residences [in Ravalli County]" <sup>2</sup> First Bitterroot Valley Community College District organizing proposal wins at ballot box
<b>2008</b>	BOR votes to not recommend the organization of Bitterroot Valley Community College District to Montana Legislature
<b>2009</b>	State Senate Education Committee, in a four to three decision, tables motion to send the resolution organizing the Bitterroot Valley Community College District to State Senate floor for a full vote BOR terminates HHEC and permits UM's Bitterroot College Program (BCP), authorizing UM "to deliver higher education in the Bitterroot Valley in an ongoing manner with guidance from [a local] steering committee" <sup>3</sup>
<b>2010</b>	BCP Steering Committee releases <a href="#">needs assessment</a> conducted by Maas Companies, Inc.
<b>2011</b>	BCP included in BOR's adoption of a <a href="#">comprehensive 2-year education mission/vision</a> for the State's 2-year units <sup>4</sup> BCP Steering Committee submits <a href="#">5-year strategic plan</a> to UM and BOR
<b>2012</b>	BCP included in BOR's rebranding of Montana University System (MUS) 2-year units; BCP renamed Bitterroot College UM <sup>5</sup> Bitterroot College (BC) Director notifies UM Provost of need for organizational changes if BOR 2-year mission is to be pursued (Attachment A) BC Advisory Council sends letter to UM leadership addressing need for organizational change if BOR 2-year mission is expected (Attachment B) No UM action follows communications
<b>2018</b>	Ravalli County stakeholders form Ravalli County Workforce Alliance (RCWA); RCWA deliberates on path forward for BC as provider of locally accessible career and technical education; discussions with local legislators and consultations with Larry Swanson, PhD economist and Director of UM's O'Connor Center for the Rocky Mountain West, <sup>6</sup> lead RCWA to conclude the organization of a locally controlled community college district would provide the community with the autonomy, funding, and recognition required for viable workforce training in Ravalli County
<b>2019</b>	RCWA submits letter to Ravalli County Elections requesting approval of a petition to solicit signatures for the placement of a proposal to organize Bitterroot Valley Community College District on May 2020 school district ballot (Attachment C).
<b>2020</b>	Elections office certifies sufficient petition signatures, clearing way for second Bitterroot Valley Community College District organizing election in May 2020

<sup>2</sup> [May 2007 Board of Regents Meeting: Agenda/Minutes, pp. 85-86.](#)

<sup>3</sup> [May 2009 Board of Regents Meeting: Minutes, pp. 11-12.](#)

<sup>4</sup> [May 2011 Board of Regents Meeting: ITEM 151-103-R0511.](#)

<sup>5</sup> [May 2012 Board of Regents Meeting: ITEM 155-106-R0512.](#)

<sup>6</sup> Swanson, L. (2018). [Ravalli County's Economic Development Needs and Opportunities - part 1, part 2.](#)

increasing operating costs. The financial restraints have resulted in reductions in the portion of the budget dedicated to instruction and student supports. Additionally, limited program access and the required course and faculty approvals have handicapped the ability to respond to local workforce training requests and the flexibility to offer programming and schedules necessary to accommodate the needs of students, residents, and the business community. The demand for courses, programs, and services exceeds the capacity of Bitterroot College UM to meet the demand.

Especially affected by the current governance and funding structure is the Bitterroot College's ability to provide college-credit career and technical programming. After over a decade of operation, Bitterroot College cannot boast a career and technical degree or certificate program. Despite Federal funds to develop and implement a Computer Support CAS<sup>7</sup> and a Welding CAS at Bitterroot College, these programs lapsed when Federal support ended. When prospects arose to establish a dental hygiene program and a license practical nurse program for delivery at Bitterroot College, despite the presence of outside development and capital improvement funding, UM did not approve these requested programs.

## **Community Benefits of Bitterroot Valley Community College**

When established, the new Bitterroot Valley Community College will have the authority, resources, and recognition required to achieve the comprehensive two-year education mission/vision as charged by the Montana Board of Regents. The new Bitterroot Valley Community College will have the authority to plan, develop, implement, and sustain academic programs responsive to its community's needs, independent of UM approval.

The new Bitterroot Valley Community College will also have access to a wider range of funding options than Bitterroot College UM. Local funds can help support college and continuing education operations and facilities. Federal Career and Technical Education dollars (Perkins Grant funding) can be awarded in support of locally accessible workforce programming. Private donors can contribute directly to the college's own foundation for capital campaigns and endowment development. Moreover, state, tuition, and fee monies will flow directly to the new college and stay with the new college.

The time has come to finally take the actions necessary to establish the Bitterroot Valley Community College District and to undertake the work necessary to transition Bitterroot College UM to a locally controlled community college district.

The subsequent sections of this document provide an overview of what the Bitterroot Valley Community College could achieve in service to its community and its State if it were reorganized and established as a local community college. Notably, the governance and funding structure for a Montana community college district would allow the two-year campus in Ravalli County to focus on effectiveness with locally elected Trustee oversight ensuring accountability, transparency, and efficiency. Under the vested management and authority of a local Board of Trustees, the new Bitterroot Valley Community College would have the necessary autonomy, resources, and recognition to pursue the full comprehensive two-year education mission and vision as directed by the Board of Regents. Importantly, the new college will provide a path forward for establishing and sustaining locally responsive, college-credit-bearing workforce development programming, as well as meeting the requirements for transferrable degrees and credits for students who will pursue university level degrees.

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<sup>7</sup> CAS = Certificate of Applied Science

# Operating Budget Proposal

The operating budget proposal presented in this section projects fall 2023 as the first semester of Bitterroot Valley Community College operations. After organization by the Montana Legislature in spring 2021, the new district will use fiscal years 2022 and 2023 to write operating policies, develop a master facilities plan, conduct an environmental scan/needs assessment, pass a voted levy, establish a foundation, and work with UM and Bitterroot College leadership to ensure a seamless transition for student matriculation to the new community college. The enrollment, tuition, fees, revenue, expenditures, and staffing numbers provided in the subsequent tables are derived from 10 years of experience operating Bitterroot College UM as well as conversations with leadership from Dawson Community College and Miles Community College. Revenue calculations are based on the Legislature’s current community college funding formula ([MCA 20-15-310](#)).

- *Projected annual full-time equivalent (FTE) students, with Fall semester headcount (counts split out by in-district/in-state/out-of-state students) – See Table 2; see Attachment D for enrollment calculation detail.*

Table 2. Projected enrollment.

## Bitterroot Valley Community College Enrollment

Student FTE	Fiscal Year Student FTE - Average Annual Enrollment				
	FY22	FY23	FY24	FY25	FY26
Resident	0	0	177	185	195
Non-resident	0	0	0	0	0
WUE	0	0	0	0	0
<b>Student FTE Total</b>	<b>0</b>	<b>0</b>	<b>177</b>	<b>185</b>	<b>195</b>

Reminder: final enrollment at end-of-term, fiscal year enrollment = ((summer + fall) + spring) / 2

Headcount	Fall 2021	Fall 2022	Fall 2023	Fall 2024	Fall 2025
Resident	0	0	308	324	340
Non-resident	0	0	0	0	0
WUE	0	0	0	0	0
<b>Headcount Total</b>	<b>0</b>	<b>0</b>	<b>308</b>	<b>324</b>	<b>340</b>

Analysis: Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY22 Student FTE; FTE to Headcount ratio is 1:1.25 for on-campus students; FTE to Headcount ratio is 1:3 for dual enrollment students; for the purpose of this exercise, no Non-resident or WUE Students are presumed.

- Per credit tuition and fee rates – See Table 3.

Table 3. Projected tuition and fee rates.

<b>THE MONTANA UNIVERSITY SYSTEM</b>					
Inventory and Validation of Fees -- Fiscal Year 2024					
Undergraduate Mandatory Fees -- Rates per Semester					
Unit Name: <b>Bitterroot Valley Community College</b>					
<b>Course Credit</b>	<b>Fees</b>	<b>In-District Tuition</b>	<b>Out of District Tuition<sup>1</sup></b>	<b>WUE<sup>2</sup></b>	<b>Out of State<sup>3</sup></b>
1	25.00	95.00	114.00	199.50	256.50
2	50.00	190.00	228.00	399.00	513.00
3	75.00	285.00	342.00	598.50	769.50
4	100.00	380.00	456.00	798.00	1026.00
5	125.00	475.00	570.00	997.50	1282.50
6	150.00	570.00	684.00	1197.00	1539.00
7	175.00	665.00	798.00	1396.50	1795.50
8	200.00	760.00	912.00	1596.00	2052.00
9	225.00	855.00	1026.00	1795.50	2308.50
10	250.00	950.00	1140.00	1995.00	2565.00
11	275.00	1,045.00	1254.00	2194.50	2821.50
12	300.00	1,140.00	1368.00	2394.00	3078.00
13	325.00	1,235.00	1482.00	2593.50	3334.50
14	350.00	1,330.00	1596.00	2793.00	3591.00
15-21	375.00	1,425.00	1710.00	2992.50	3847.50
<b>FY24</b>					
<b>FTE Rate</b>	<b>375.00</b>	<b>1,425.00</b>	<b>1,710.00</b>	<b>2,992.50</b>	<b>3,847.50</b>

<sup>1</sup> Out of District Tuition is 20% higher than In-District Tuition

<sup>2</sup> WUE Tuition is 75% higher than Out of District Tuition

<sup>3</sup> Out of State Tuition is 125% higher than Out of District Tuition

- *Inventory and validation of fees for first three years of operation – See Table 4.*

Table 4. Projected inventory and validation of fees.

<b>Bitterroot Valley Community College</b>					
Inventory and Validation of Fees -- Fiscal Years 2024, 2025, & 2026					
<b>Tuition Rates per Semester for a Full Time Student (12 credits)</b>					
<b>Category</b>	<b>FY 24 Tuition</b>	<b>FY 25 Tuition</b>	<b>% Increase</b>	<b>FY 26 Tuition</b>	<b>% Increase</b>
In-District	1,140.00	1,140.00	0.0%	1,140.00	0.0%
Resident UG	1,368.00	1,368.00	0.0%	1,368.00	0.0%
WUE	2,394.00	2,394.00	0.0%	2,394.00	0.0%
Nonresident UG	3,078.00	3,078.00	0.0%	3,078.00	0.0%
<b>Mandatory Fees per Semester for a Full Time Student</b>					
<b>Category</b>	<b>FY 24 Fees</b>	<b>FY 25 Fees</b>	<b>% Increase</b>	<b>FY 26 Fees</b>	<b>% Increase</b>
In-District	300.00	300.00	0.0%	300.00	0.0%
Resident UG	300.00	300.00	0.0%	300.00	0.0%
WUE	300.00	300.00	0.0%	300.00	0.0%
Nonresident UG	300.00	300.00	0.0%	300.00	0.0%
<b>Total, Tuition and Mandatory Fees per Semester for a Full Time Student</b>					
<b>Category</b>	<b>FY 24 Total</b>	<b>FY 25 Total</b>	<b>% Increase</b>	<b>FY 26 Total</b>	<b>% Increase</b>
In-District	1,440.00	1,440.00	0.0%	1,440.00	0.0%
Resident UG	1,668.00	1,668.00	0.0%	1,668.00	0.0%
WUE	2,694.00	2,694.00	0.0%	2,694.00	0.0%
Nonresident UG	3,378.00	3,378.00	0.0%	3,378.00	0.0%



- Revenue amounts distributed by source (state, net tuition, and local funding) – See Table 5; see Attachment E for revenue calculation detail.

Table 5. Projected revenue.

## Bitterroot Valley Community College

### Current Unrestricted Revenue & Metrics

REVENUE	FY22	FY23	FY24	FY25	FY26
State Support	\$0	\$0	\$1,092,250	\$1,126,356	\$1,161,654
Local Funding	\$0	\$0	\$650,000	\$650,000	\$650,000
Net Tuition Revenue	\$0	\$0	\$526,830	\$553,172	\$580,830
Transfers/Other	\$0	\$0	\$12,500	\$25,605	\$43,086
<b>Total Operating Revenue</b>	<b>\$0</b>	<b>\$0</b>	<b>\$2,281,580</b>	<b>\$2,355,132</b>	<b>\$2,435,569</b>
<b>Student FTE</b>	0	0	177	185	195
Resident Students	0	0	161	185	195
Non-resident Students	0	0	0	0	0
<b>Key Metrics</b>					
State % Share	0.0%	0.0%	47.9%	47.8%	47.7%
State Support per Res FTE	\$0	\$0	\$6,784	\$6,076	\$5,968

Analysis: Transfers/Other include General Fund carry overs from succeeding FY; Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY24 Student FTE; for the purpose of this exercise, no Non-resident Students are presumed.

- Expenditures by Program Area (Instruction, Academic Support, Student Services, Inst. Support, & Operations & Maintenance)- See Table 6; see Attachment F for expenditures calculation detail.

Table 6. Projected expenditures.

## Bitterroot Valley Community College Current Unrestricted Expenditures & Metrics

EXPENDITURES	FY22	FY23	FY24	FY25	FY26
Instruction	\$0	\$0	\$930,892	\$954,164	\$978,018
Academic Support	\$0	\$0	\$218,442	\$223,903	\$229,501
Student Services	\$0	\$0	\$309,703	\$317,446	\$325,382
Institutional Support	\$0	\$0	\$652,116	\$668,419	\$685,129
Operation & Maintenance	\$0	\$0	\$157,946	\$161,895	\$165,943
<b>Total CU Exp</b> (net of waivers/SA) →	<b>\$0</b>	<b>\$0</b>	<b>\$2,269,100</b>	<b>\$2,325,828</b>	<b>\$2,383,973</b>
<b>Student FTE</b>	0	0	177	185	195
<b>Key Metrics</b>					
% Instruction Exp	0%	0%	41%	41%	41%
% Instruct/Acad/Stud Ser	0%	0%	64%	64%	64%
Expenditures per Student	\$0	\$0	\$12,852	\$12,546	\$12,248

Analysis: Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY24 Student FTE; for the purpose of this exercise, Expenditures are increased annually from FY24 by 2.5% as an inflationary adjustment.

- Full-time equivalent employees, split out by categories: faculty, administration & professionals, classified staff; total expenditures on personnel services – See Table 7; see Attachment G for staffing calculation detail; see Attachment H for organization chart.

Table 7. Projected staffing.

## Bitterroot Valley Community College

### Current Unrestricted Faculty/Staff FTE & Metrics

<b>STAFFING</b> <small>(full-time equivalent)</small>	FY22	FY23	FY24	FY25	FY26
Contract Faculty (all)	0.0	0.0	12.8	12.8	12.8
Contract Professional & Admin.	0.0	0.0	6.0	6.0	6.0
Classified Staff FTE	0.0	0.0	8.0	8.0	8.0
<b>Total Faculty/Staff</b>	0.0	0.0	26.7	26.7	26.7
<b>EXPENDITURES</b>					
Personnel Services	0	0	1,868,600	1,915,315	1,963,198
Total Expenditures <small>(net of waivers)</small>	0	0	2,269,100	2,325,828	2,383,973
<b>Student FTE</b>	0	0	177	185	195
<b>Key Metrics</b>					
Student to Faculty Ratio	0.0	0.0	13.8	14.5	15.3
%Personnel Services of Total	0%	0%	82%	82%	82%

Analysis: For the purpose of this exercise, Expenditures are increased annually from FY24 by 2.5% as an inflationary adjustment; Student FTE includes 127 on-campus FTE and 50 dual enrollment FTE for FY24; Student FTE for FY25 & FY26 represents an annual 5% increase from FY24 Student FTE.

# Educational Objective/Academic Program Plan

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The academic mission, academic programming strategy, and student/academic support strategy for Bitterroot Valley Community College will be guided by Montana Board of Regents policy and directive per the Regents' responsibility to supervise and coordinate the State's community colleges.<sup>8</sup>

## **Academic Mission**

The mission of Bitterroot Valley Community College will follow the [mission/vision for Montana's two-year education](#) as adopted by the Board of Regents in May 2011.<sup>9</sup>

## **Vision Statement**

Transform lives and create opportunities through educating the citizens of the state of Montana.

## **Mission Statement**

Provide a comprehensive, accessible, responsive, student-centered learning environment that facilitates and supports the achievement of individuals' professional and personal goals, and enhances the development of Montana's citizens, communities, and economy.

## **Key Purposes**

- Transfer Education through the Associate's Degree
- Workforce Development, including Certificates and Applied Associate's Degrees
- Developmental and Adult Basic Education
- Lifelong Learning
- Community Development

## **Key Attributes**

- Open Access Admissions
- Affordable
- Student-Centered
- Adult Focused and Accessible Learning
- Responsiveness to Local Needs
- Cultivation of Partnerships

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<sup>8</sup> [The Constitution of the State of Montana, Article X, Part X, Section 9 \(2\)\(a\).](#)

<sup>9</sup> [May 2011 Board of Regents Meeting: ITEM 151-103-R0511, Mission/Vision document.](#)

## Academic Programming Strategy

- *Academic programming strategy, including rationale for balance between “transfer” (e.g. A.A. and A.S) and “terminal” (e.g. certificate, A.A.S.) workforce development programming*
- *Summary of needs assessment/gap analysis that supports academic programming strategy*

The needs and interests of the district’s residents as well as the needs and interests of the State of Montana will guide the academic programming strategy for Bitterroot Valley Community College. Likewise, community and state demand will guide the balance between transfer programming and terminal workforce development programming for Bitterroot Valley Community College.

It is noted that a 2017 analysis of labor market outcomes for Montana college graduates concluded general studies program graduates (AA/AS students) were presently in considerable oversupply in the State.<sup>10</sup> Being cognizant of this type of graduate oversupply issue is critical when managing academic programming and advising students on degree pathways. Bitterroot Valley Community College will grow and shrink academic programs according to local, state, and regional labor market analyses and will emphasize the communication of labor market demand information to students. Moreover, Bitterroot Valley Community College will develop academic programs and structure academic advising following the guided pathways model—ensuring clarity in program progression, timeliness in program completion, and transparency in program workforce outcomes.<sup>11</sup>

With respect to assessing local interests, tools to inform academic program development will include the establishment of local industry sector advisory boards and the establishment of a local government advisory board (including representation from county, municipal, and school district governments) as well as input from the Bitterroot Community Management Team (CMT; an existing local workforce development organization which includes multiple local/state/federal government and non-profit partners from the labor & industry and health & human services sectors). Additionally, depending on the circumstance, ad hoc community forums, focus groups, and surveys will be employed to gather relevant program development assessment data. With respect to assessing state interests in programming, the Department of Labor and Industry, the Office of the Commissioner of Higher Education, the Office of Public Instruction, various state-wide industry associations, and the state’s other two-year education campuses will be understood as the primary collaborating partners and information sources for academic program development.

While a final academic program strategy cannot be presented until planning resources are in place and assessment work can begin in earnest, a review of current labor market supply and demand data<sup>12</sup> suggests Bitterroot Valley Community College’s initial academic offerings will focus on the programs shown in Table 8. It is also anticipated the community will have an interest in developing one or more niche regional programs. Program areas likely to be considered include ***dental hygiene, sustainable agriculture, viticulture, and water resources.***

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<sup>10</sup> Watson, A., Wagner, B., Lacy, K., & Rose, E. (2017). *Meeting state worker demand: A report on the labor market outcomes of Montana colleges*. Helena, MT: State of Montana. Retrieved from <http://lmi.mt.gov/Publications/meeting-state-worker-demand>

<sup>11</sup> Bailey, T. (2017). Guided pathways at community colleges: From theory to practice. *Diversity & Democracy*, 20(4). Retrieved from <https://www.aacu.org/diversitydemocracy/2017/fall/bailey>

<sup>12</sup> Datasets examined: a) DLI and OCHE first-cut analysis of workforce supply and demand data, and b) Burning Glass Technologies labor insight data; datasets provided by Victoria Clark, Director, Bitterroot College UM; datasets provided to Montana two-year campus leaders via email, June 2020.

Table 8. Academic programs suggested from current labor market data.

<b>Academic Program Department</b>	<b>Academic Program Certificate/Degree</b>
<b>Business</b>	Bookkeeping (CTS/CAS) Management - Sales, Operations, & Small Business (CTS/CAS) Paralegal & Legal Assistant (CTS/CAS)
<b>Computers</b>	Computer User Support Specialist (CTS/CAS) Computer Systems Analyst (CTS/CAS)
<b>Education</b>	Early Childhood Education (AAS) Teacher's Aid (CTS) Childcare Worker (CTS)
<b>Health Care</b>	Registered Nurse (ADN/ASN) Licensed Practical Nurse (AAS) Medical Records & Health Information Technician (CTS/CAS/AAS) Dental Assistant (CTS) Medical Assistant (CTS/CAS/AAS) Nursing Assistant (CTS)
<b>Industrial Technology</b>	Heavy & Tractor-Trailer Truck Driver (CTS) Automotive Service Technician & Mechanic (CTS/CAS/AAS) Heating & Air Conditioning Mechanic & Installer (CTS) General Maintenance & Repair (CTS/CAS) Construction Laborer (CTS) Plumber (CTS/CAS/AAS) Welder (CAS)
<b>Natural Resources/Agriculture</b>	Forest & Conservation Technician (CTS/CAS)
<b>Tourism/Recreation/Retirement</b>	Cook, Restaurant (CAS/AAS) Food Preparation Worker (CTS/CAS)
<b>Transfer Degrees</b>	Associate of Arts (AA) Associate of Science (AS) <i>AA/AS coursework focused on guided pathways for bachelor's degrees in Nursing, Business (Accounting, Finance, Human Resources, &amp; Management/Operations), Education, Psychology (Counselors &amp; Therapists), Graphic Design, Biology, &amp; Computer Science</i>

CTS = Certificate of Technical Studies      AA = Associate of Arts Degree  
CAS = Certificate of Applied Science      AS = Associate of Science Degree  
AAS = Associate of Applied Science Degree

- *Plan for submitting all academic programs as new programs for approval by the Board of Regents*

Regarding the submission of academic programs for Board of Regents' approval and/or notification, the Bitterroot Valley Community College will follow Board of Regents policy and the Office of the Commission of Higher Education (OCHE) procedures (as outlined in its [Academic Affairs Procedural Guidebook](#)) for all academic program establishment. Notably, in the new community college's initial years of operation, the current plan is to focus first on establishing campus certificates of under 29 credits (Certificates of Technical Skills and certain Certificates of Applied Science) which are procedurally Level 1 items, only requiring Board of Regent notification. For certificates of more than 29 credits and associate of applied science degrees, the new college will initially seek temporary program status for these curricula—also Level 1 items but requiring OCHE approval in addition to Board of Regents notification. Building Bitterroot Valley Community College's academic programs via the Level 1 campus approval and then OCHE approval pathway will allow the new college to grow at a manageable pace and will also align with present research

promoting the completion of stackable workforce credentials as students move through degree programs.<sup>13</sup>

- *Accreditation plans*

The Bitterroot Valley Community College will negotiate an instructional agreement with one of Montana’s public institutions of higher education that is independently accredited through the [Northwest Commission on Colleges and Universities](#) (NWCCU). The instructional agreement will specify instructional conditions Bitterroot Valley Community College must meet to offer accredited college courses and grant accredited college certificates and degrees under the accreditation umbrella of the agreeing institution. Included in the instructional agreement will be terms of compensation to the agreeing institution for instructional services rendered. It is anticipated Bitterroot Valley Community College would maintain such an instructional agreement with the agreeing institution for between seven and 10 years, allowing ample time for the new community college to seek independent NWCCU accreditation. It is noted that as long as both parties agree to renewal, an instructional agreement could last indefinitely; to the best understanding, NWCCU has not set a time limit on such agreements.

Examples of like instructional agreements among institutions within the NWCCU accreditation region exist in the Oregon Community College System (see Attachment I). It is noted in the *Sample Oregon Community College and Portland Community College Intergovernmental Service Agreement* that the contract covers both instructional (academic) and administrative services. In addition to Academic Services, the Oregon sample agreement includes: a) Enrollment Services, b) Institutional Research, c) Libraries, and d) Financial Services. Depending on the interests of the agreeing institutions, Bitterroot Valley Community College could consider negotiating specific administrative services in addition to instructional services. If certain administrative services were added to the agreement, then compensation to the agreeing institution from Bitterroot Valley Community College would increase accordingly. This increase in compensation, however, would decrease the new college’s budgeted expenses in the related services. In a [2014-2015 agreement between Oregon Coast Community College and Portland Community](#) services included academic affairs, student affairs (including transcribing and financial aid services), library, and external reporting. Compensation to the providing institution in this 2014-2015 agreement was based on 10% of all faculty personnel costs (wages, benefits, and payroll taxes) plus 18%. If such a compensation formula were used between Bitterroot Valley Community College and an agreeing institution, the annual agreement cost to the new college based on budgets proposed earlier in this document would be \$105,000. This compensation amount for instructional and administrative services would be balanced by the negation of budgeted expenses for library, accreditation, and financial aid services as well as an Enterprise Management System—all of which currently account for nearly \$150,000 in expenses presented in the earlier budget section of this document.

## **Student/Academic Support Strategy**

- *Plan for providing academic and other student support and student success strategies*

Bitterroot Valley Community College will provide academic and other student support and student success strategies under the umbrella of a student services office. The new college’s student

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<sup>13</sup> Bailey, T. (2018). Responding to divergent trends: Vocational and transfer education at community colleges. *Change: The Magazine of Higher Learning*, 50(3-4), 113-116. doi: 10.1080/00091383.2018.1509634.

services office will include: a) enrollment services (admissions, registration, financial aid, and student records), b) academic and career advising services (including apprenticeship, internship, & community service placement and transfer support), and c) student success services (tutoring, testing/proctoring, media/library, disability support, veterans support, and mental health & human services referrals).

As mentioned in the previous *Academic Programming Strategy* section, Bitterroot Valley Community College will implement a guided pathways approach in program planning and academic advising. The four major elements of the guided pathways approach for student success are: a) clarify paths to student end goals, b) help students choose and enter a pathway, c) help students stay on path, and d) ensure that students are learning.<sup>14</sup> Employing the guided pathways model focuses Bitterroot Valley Community College on student workforce awareness and student program completion resulting in timely graduates with valued labor market credentials.

- *Technology / Learning Management System (LMS) plans*

There are a number of Learning Management Systems (LMS) marketed to higher education. Systems currently in use by Montana two-year campuses include *Canvas*, *D2L Brightspace*, and *Moodle*. Bitterroot Valley Community College will decide upon a LMS based on research of application features and pricing as well as consultation with OCHE and the State's other two-year units. It is also possible the instructional agreement made between Bitterroot Valley Community College and the agreeing institution will include access to the agreeing institution's LMS. If this were the case, then the new college's LMS expense would be incorporated into the compensation negotiated in the instructional agreement.

Other types of technology employed by higher education institutions to assist with student services management include recruitment software such as *Hobsons CRM* or *Slate*, advising services software such as *DegreeWorks*, *Navigate*, and *Starfish*, and disability services software such as *Accommodate*. Due to Bitterroot Valley Community College's relatively small initial student volume, such comprehensive management systems will not be immediately required for student services' success. When the new college reaches a critical student mass, these types of management systems will be researched and subscribed to as needed. Additionally, as with the LMS, it is possible that student services management software could be included in the instructional agreement negotiated between Bitterroot Valley Community College and the agreeing institution. Such software inclusion could be negotiated at the onset of the agreement or years into the agreement.

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<sup>14</sup> American Association of Community Colleges and Community College Research Center. (2018). What is the pathways model? Retrieved from [https://www.pathwaysresources.org/wp-content/uploads/2018/04/PathwaysModelDescription\\_Final.pdf](https://www.pathwaysresources.org/wp-content/uploads/2018/04/PathwaysModelDescription_Final.pdf)



# Infrastructure – Facilities, Equipment, & Information Technology

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The infrastructure plan for Bitterroot Valley Community College includes a short-term strategy and a long-range vision. In the immediate years following the organizing of the new college, the plan is to transition the existing infrastructure of Bitterroot College UM to function similarly for Bitterroot Valley Community College. The long-term infrastructure vision for the new college is to acquire land for the site of a permanent campus and buildout accordingly. In the short term, operational funds will be used to continue the existing operation. In the long term, a capital campaign will be developed and implemented to raise funds for securing a campus location and constructing and/or remodeling desired facilities.

- *Campus physical plant and buildings*

Bitterroot College UM currently negotiates an annual lease with the Hamilton School District for a 23,700 ft<sup>2</sup> former middle school located at 103 South 9<sup>th</sup> Street in Hamilton. Bitterroot Valley Community College plans to assume this existing lease arrangement and agreement. The building includes a 3,960 ft<sup>2</sup> common area/gym, five small lecture/seminar rooms, an art studio, a computer lab, a fabrication lab, a healthcare lab, a science lab, a student success center, a student reception area, a break/mail/copier space, a food service space, offices for up to 26 staff, men’s and women’s restrooms, and various janitorial, mechanical, IT, and storage space. The existing building is of sufficient assignable space to serve a college student population of approximately 200 FTE.<sup>15</sup> Annual expenses for the property, based on present figures, are a \$70,000 lease payment, a \$30,000 utilities payment (gas, electricity, and water), and an \$18,000 connectivity payment. Unrestricted and designated operational funds will be used to pay the annual physical plant and building expenses. Notably, the building dates to 1963 and needs significant upgrades to its heating, ventilation, and air condition system and security system. For a college to continue operating in this space, whether it be Bitterroot College UM or Bitterroot Valley Community College, investments will likely need to be made in the short-term. Bitterroot Valley Community College will fund any immediately necessary facility improvements via designated fund revenue or donor contributions.

Regarding Bitterroot Valley Community College’s potential need for short-term space associated with industrial trades programming (i.e., construction, welding), the new college will negotiate with area school districts for after-hour access to existing high school shop space. Bitterroot College UM successfully negotiated and maintained such an agreement with Hamilton School District in FY2015-2017 for a welding certificate of applied science program.<sup>16</sup> Costs associated with such an agreement would be funded via a program fee paid by students.

With respect to a long-range physical plant and buildings’ vision, one option would be for Bitterroot Valley Community College to negotiate a purchase of the existing leased space and its accompanying acreage (15.35 acres) from the Hamilton School District. This location could then be developed and kept in perpetuity as the permanent campus for Bitterroot Valley Community College. The campus would be within walking distance to the County’s primary medical complex as well as the National Institutes of Health’s Rocky Mountain Laboratories, Ravalli County government offices, and Hamilton’s downtown business and retail district, allowing for accessible instructional

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<sup>15</sup> See [Bitterroot College Needs Assessment \(2010\)](#), p. 45.

<sup>16</sup> Program funded by the RevUp Grant (Federal Trade Adjustment Assistance Community College and Career Training Grant [TAACCCT] grant program).

partnerships with numerous local entities. Moreover, the campus would have convenient access to the Bitterroot River, allowing for accessible outdoor instructional activities associated with recreation and natural resources. Costs associated with acquiring and developing the land and initial facilities associated with a permanent campus would be funded by a capital campaign of approximately \$25 million.

- *Academic and administrative equipment*

Bitterroot Valley Community College will request an at-no-cost transfer of ownership of all existing Bitterroot College UM academic and administrative equipment from the University of Montana to the new college. Notably, the majority of current equipment at Bitterroot College UM was purchased or acquired through grants, donations, student fees, and one-time-only legislative funding, not via Bitterroot College's annual UM General Fund allocation. Additionally, nearly all the present college's office furnishings and much of its computer hardware are comprised of UM and State surplus inventory. With respect to costs associated with new equipment for a new or remodeled facility, expenses would be included in the associated capital campaign.

- *Enterprise information system*

Bitterroot Valley Community College's choice of an Enterprise Management System (EMS) could be affected by its instructional agreement with its accreditation partner college. If the terms of the agreement include administrative services, then Bitterroot Valley Community College will link to the partnering college's EMS. The expense associated with this linkage will be incorporated into the instructional agreement. If the terms of the agreement do not include administrative services, then the Bitterroot Valley Community College would research various EMS options while also consulting with OCHE regarding the State's requirements for the receipt of enterprise data (financial and student records). It is understood that all the State's public units of higher education excepting Flathead Valley Community College use Ellucian Banner for their EMS. Currently, Miles Community College and Dawson Community College each pay the UM approximately \$80,000 annually to be on UM's instance of Banner. One EMS route for Bitterroot Valley Community College would be to negotiate a like contract with the UM to be on its instance of Banner. Unrestricted funds would be used to pay for any annual EMS subscription cost.

# Attachments

## Attachment A. Bitterroot College Director memo to UM Provost, 2018.

**To:** Beverly Edmond, UM Provost

**From:** Victoria Clark, Director, Bitterroot College UM

**Date:** January 29, 2018

**RE:** Recommendations for Immediate Action per APASP: Bitterroot College

In order for the Bitterroot College to achieve its comprehensive two-year education mission in the service of the 40,000 residents of Ravalli County and as stated by the Montana University System, organizational/structural changes needed include the following:

- Bitterroot College **student and fiscal data need to be disaggregated** from Missoula College.  
Data disaggregation allows for:
  - Evidence-based decision-making
  - Faculty and staff ownership of outcomes
  - A distinct Bitterroot College identity, critical for recruitment clarity, recruitment opportunity, and resource opportunity
- Bitterroot College needs **academic and student services authority** akin to other UM colleges and/or MUS campuses.  
Academic and student services authority allows for:
  - Program and service development and delivery to be driven foremost by student and community needs
  - Faculty and staff vested in programming and support
- Bitterroot College needs **state allocation equity** on par with Montana's other two-year units.  
State allocation funding equity allows for:
  - Program and service responsiveness expectations to be met
  - Faculty and staff commitment to unit

Options for **immediate action for organizational/structural change** which could provide a path for student and fiscal data disaggregation, academic and student services authority, and state allocation equity:

1. Bitterroot College becomes an official branch campus of the UM per Northwest Commission on Colleges and Universities (NWCCU)
2. Bitterroot College becomes an official campus of the University of Montana per MCA 20-25-201
3. Bitterroot College becomes a community college district per MCA 20-15-2

Comments on UM Provost's APASP Recommendations per Bitterroot College

- Recommendation to place Bitterroot College under Missoula College
  - Not permitted under current Montana Statute (MCA 20-25-21)
    - Only UM and MSU are permitted to have campuses
  - Does not address the three organizational/structural changes identified above which are needed for the Bitterroot College to achieve its comprehensive two-year education mission in Ravalli County and per the Montana University System two-year initiative
  - Does not appreciate that the scope of Bitterroot College responsibilities to its students and to Ravalli County are broader than the scope of Missoula College responsibilities to its students and to Missoula County. As a geographically distinct campus from the UM, the Bitterroot College addresses a host of academic, admissions, advising, facilities, programming, safety, security, and treasury issues through local partnerships and/or directly with the UM. Missoula College, due to its immediate proximity to the UM as well as Missoula County's approach to adult education programming, defers these issues to either the UM or Missoula County Public Schools. If Bitterroot College were put under the authority of Missoula College, Missoula College would be required to provide oversight for issues which are not under its own regular, operational purview.
  - Does not appreciate the real and perceived conflict of interest between Missoula College and Bitterroot College
  - Does not appreciate the correlation between local control and success
  - Political ramifications of this option with respect to the Bitterroot College Advisory Council, Ravalli County Commissioners, Ravalli County state legislative delegation, and Ravalli County voters should be understood before this option is exercised
- Recommendation for Bitterroot College to remain a stand-alone affiliate
  - Requires legislative approval as a UM campus in Hamilton would need to be added per MCA 20-25-201
  - "Substantial investment" assertion is not accompanied by data; a researched proposal for an autonomous campus which speaks to necessary costs and process is needed for an objective evaluation
  - Any "investment" required for an autonomous campus should be the state's responsibility not the UM's responsibility; the Bitterroot College should not remain an unfunded mandate of the UM
  - Independent accreditation is not required for a branch campus; autonomous campuses can also be under the accreditation umbrella of a separate institution



April 9, 2018

Paula Short, Director of Communications  
Paul Kirgis, Acting Provost  
University of Montana

Dear Director Short and Provost Kirgis,

The purpose of this letter is to communicate with UM Administration the Bitterroot College Advisory Council's preference for the Bitterroot College as a new Provost joins our community.

As Advisory Council to the Bitterroot College, our goal is to become an Affiliate Campus, per Montana Code, like the Butte, Dillon, and Helena campuses. With this organizational structure, the Bitterroot College administrative reporting line would be directly to the UM President.

Our goal allows for:

1. **Academic and student services** authority, including:
  - a. Program and service development and delivery to be driven by student and community needs. The priority in this outcome is to meaningfully respond to Ravalli County workforce development and adult education needs;
  - b. Faculty and staff conferred with the authority to develop programming in response to these needs and support value-added adult education opportunities.
2. **State allocation equity** commensurate with Montana's other two-year units, supporting:
  - a. Fiscal ability to meet program and service obligations to be responsive to community-based needs;
  - b. Appropriate faculty and staff to provide for these needs.
3. **Student and fiscal data disaggregation** specific to Bitterroot College, enabling:
  - a. Evidence-based decision-making,
  - b. Faculty and staff investment in outcomes,
  - c. Recruitment clarity, recruitment opportunity, and resources development,

In addition, at the request of the Advisory Council, Bitterroot College Director Victoria Clark has compiled a history of Unduplicated Student Headcount for the academic years 2015-2018 (enclosed). The Council requested these numbers because the College's attendance footprint is camouflaged within the Missoula College data. As a geographically distinct campus, Bitterroot College addresses a wide variety of academic, admissions, advising, facilities, programming, safety and security, and treasury responsibilities. As an Adult Education provider, the College must respond to Ravalli County residents' needs and interests. Local support and commitment for the Bitterroot College is strong and long-term in nature.

Ms. Short, as Director of Communications, we are requesting that our vision be shared broadly within the UM community and with our new Provost.

Sincerely,

Candy Lubansky  
Chairperson, Bitterroot College Advisory Council

CC: President Bodnar, Director Clark, Provost Harbor

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BITTERROOT COLLEGE UM  
103 South 9<sup>th</sup> Street | Hamilton, MT 59840  
406.375-0100 | FAX 406.375-0200 | [www.umt.edu/bc](http://www.umt.edu/bc)

Attachment C. Ravalli County Workforce Alliance Letter to Ravalli County Elections, 2019.

Regina Plettenberg  
Ravalli County Elections Administrator  
215 South 4<sup>th</sup> Street, Suite C  
Hamilton, MT 59840

May 15, 2019



Dear Ms. Plettenberg,

On behalf of the Ravalli County Workforce Alliance—a Ravalli County citizen group advocating for the establishment of a local public community college— we are submitting, with this letter, a copy of our petition calling for an organization election of the Community College District of the Bitterroot Valley, Montana. The petition document responds to the relevant Montana statute (§ 20-15-201) showing that the proposed Community College District of the Bitterroot Valley, Montana meets statutory criteria. It is noted that the proposed Community College District of the Bitterroot Valley, Montana coincides with the boundaries of the following elementary school districts: Corvallis K-12 Schools, Darby K-12 Schools, Hamilton K-12 Schools, Lone Rock Elementary School, Pinesdale Elementary School, Stevensville Elementary School, and Victor K-12 Schools. The petition document identifies the number of signatures of registered electors needed to meet the statutory requirements, pursuant to § 20-15-202. Please note that the 20 % number required by law is calculated from the most recent certification of the number of eligible electors registered within the precincts comprising the proposed Community College District of the Bitterroot Valley, Montana.

In addition to the petition attachment are four other documents. One validates the number of public high school students regularly enrolled within the proposed community college district per Montana Office of Public Instruction, GEMS data warehouse. The second validates the tax value of the proposed community college district per the Montana Department of Revenue at Property.MT.gov. The third document, from the Ravalli County GIS Department, shows the legal boundary of the proposed community college district and how the boundary coincides with existing boundaries of contiguous elementary school districts, all of which are located in Ravalli County. Finally, the fourth document provides the number of registered electors within the proposed community college district as obtained from your office on April 16, 2019.

We would like to begin gathering signatures no later than July 15, 2019 and conclude on or before December 15, 2019. If you have any further questions or need further documentation, please do not hesitate to contact Candy Lubansky at the email address or phone number provided below. We look forward to hearing back from you following your review of our petition and supporting documentation.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Steve Grover'.

Steve Grover  
Chair, Ravalli County Workforce Alliance  
Managing Member, Bitterroot Gateway Development

A handwritten signature in blue ink, appearing to read 'Candy Lubansky'.

Candy Lubansky  
Ravalli County Workforce Alliance  
406.370-5030 lubansky@msn.com

A handwritten signature in blue ink, appearing to read 'Julie Foster'.

Julie Foster  
Ravalli County Workforce Alliance  
Executive Director, Ravalli County Economic Development Authority

*Links to documents accompanying letter:*

- [Final Petition](#)
- [Public High School Student Count](#)
- [Tax Value of Proposed District](#)
- [Legal Boundary of Proposed District](#)

## FY2024 Projections

Faculty Department	Faculty FTE	Credits	Sections	Student FTE	
				Low Enrollment	High Enrollment
General Education					
Tenured	4.00	52	17	52	87
Adjunct	1.50	23	8	23	38
Business & Technology					
Tenured	1.00	13	4	7	9
Adjunct	1.00	15	5	8	10
Health Professions					
Tenured	1.00	13	4	9	12
Adjunct	0.50	8	3	5	7
Industrial Technology					
Tenured	2.00	26	9	12	17
Adjunct	0.50	8	3	4	5
Natural Resources/Ag					
Tenured	1.00	13	4	6	9
Adjunct	0.25	4	1	2	3
	<b>12.75</b>	<b>173</b>	<b>58</b>	<b>127</b>	<b>195</b>

**FTE:Headcount Ratio**

Campus 1:1.25

Dual Credit 1:3.00

**Headcount**

158 Campus Headcount

150 Dual Credit Headcount

**308 Total Headcount**

**Assumptions**

*Tenured faculty teach 13 credits per semester*

*Adjunct faculty teach 15 credits per semester*

*All sections equal 3 credits*

*Low Enrollment is 15 students/section for General Education, 8 students/section for Business & Technology, 10 students/section Health, 7 students/section for Industrial Technology and Natural Resources/Agriculture*

*High Enrollment is 25 students/section for General Education, 10 students/section for Business & Technology, 14 students/sections for Health, 10 students/sections for Industrial Technology and Natural Resources/Agriculture*

*Headcount total based on Low Enrollment assumption*

Attachment E. Revenue calculation detail (two tables).

CURRENT UNRESTRICTED OPERATING ACCOUNT SUMMARY OF REVENUE DATA (TOTAL)			
UNIT NAME: BITTERROOT VALLEY COMMUNITY COLLEGE			
NAME OF FUND	FY2024 BUDGETED	PERCENT	
State Appropriation	\$ 1,092,250	47.9%	
Tuition & Fees			
Student Fees	\$ 94,913	4.2%	
In-District Tuition	\$ 431,918	18.9%	
Out of District Tuition	\$ -	0.0%	
Out of State Tuition	\$ -	0.0%	
WUE Tuition	\$ -	0.0%	
Total Tuition & Fees	\$ 526,830	23.1%	
Mandatory Levy (Local Support)			
Operational	\$ 439,107	19.2%	
Retirement	\$ 210,893	9.2%	
Total Mandatory Levy	\$ 650,000	28.5%	
Other	\$ 12,500	0.5%	
<b>Total Revenues</b>	<b>\$ 2,281,580</b>	<b>100.0%</b>	
			<b>ACADEMIC YEAR</b>
			<b>23-24</b>
<b>MANDATORY TUITION AND FEES PER STUDENT (@ 15 credits)</b>	<b>Tuition</b>	<b>Fees</b>	<b>Total</b>
In-District	\$2,850	\$750	\$3,600
Out of District	\$3,420	\$750	\$4,170
Out of State	\$7,695	\$750	\$8,445
WUE	\$5,985	\$750	\$6,735
Estimated value of one mill - Bitterroot Valley Community College District FY2024		\$73,401	
Percent of mandatory mill levy support		28.5%	

## FY2024 Projections

### State Allocation

Student Enrollment (FTE) Projection	Variable Cost of Education per Student FTE	Fixed Cost of Education <sup>1</sup>	State Percent Share	State Allocation	Percent Share
177	\$ 3,196	\$ 1,701,825	48.2%	\$ 1,092,250	47.9%

### Student Tuition

Student Enrollment (FTE) Projection <sup>2</sup>	Tuition/credit	No. of Semesters	Student Tuition Revenue	Percent Share
127	\$ 95.00	2	\$ 360,668	
50	\$ 47.50	2	\$ 71,250	
			\$ 431,918	18.9%

### Student Fees

Student Enrollment (FTE) Projection	Mandatory Fees/credit	No. of Semesters	Student Fees Revenue	Percent Share
127	\$25	2	\$ 94,913	
Other Fees (application fee, orientation fee, course fees, program fee, etc.)			\$ 12,500	
			\$ 107,413	4.7%

### Local Mills for College Programming

Revenue per Mill	Taxpayer Mills	Mill Revenue	Percent Share
\$ 73,401	5.98 <i>Operating</i>	\$ 439,107	
\$ 73,401	2.87 <i>Retirement</i>	\$ 210,893	
	<b>8.86</b>	\$ 650,000	28.5%

**Total Unrestricted Revenue \$ 2,281,580 100%**

Mills:<sup>3</sup> **8.86**

Property Value	Taxpayer Cost
\$ 100,000	\$ 11.95
\$ 200,000	\$ 23.91
\$ 300,000	\$ 35.86

<sup>1</sup> Fixed Cost of Education is 75% of Operating Budget

<sup>2</sup> First row is regular students; second row is dual enrollment students

<sup>3</sup> 1 Mill = \$1.35 per \$100,000 property value



Attachment F. Expenditure calculation detail (six tables).

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA - TOTAL		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: TOTAL BUDGETED UNRESTRICTED EXPENSES		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	12.75	45.2%
Contract Professional & Admin.	6.00	21.3%
Support Staff	7.95	28.2%
Other Employees (Workstudy)	1.50	5.3%
<b>TOTAL FTE'S</b>	<b>28.20</b>	<b>100.0%</b>
<b>PERSONAL SERVICES:</b>		
Contract Faculty	\$ 630,895	27.8%
Contract Professional & Admin.	\$ 342,500	15.1%
Support Staff	\$ 280,425	12.4%
Other Employees (Workstudy)	\$ 9,504	0.4%
<b>Total Salaries</b>	<b>\$ 1,263,324</b>	<b>55.7%</b>
Employee Benefits	\$ 605,276	26.7%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 1,868,600</b>	<b>82.3%</b>
OPERATING EXPENSES:		
Contracted Services	\$ 237,500	10.5%
Supplies and Materials	\$ 26,500	1.2%
Communications	\$ 26,000	1.1%
Travel	\$ 12,000	0.5%
Rent	\$ 57,000	2.5%
Utilities	\$ 23,000	1.0%
Repair and Maintenance	\$ 5,000	0.2%
Other	\$ 3,000	0.1%
Total Operating Expenses	\$ 390,000	17.2%
Equipment and Capital	\$ 10,500	0.5%
Total Expenditures	\$ 2,269,100	100.0%
<b>TOTAL EXPENDITURES BY OBJECT</b>	<b>\$ 2,269,100</b>	<b>100.0%</b>
<b>Recap by Program:</b>		
Instruction	\$ 930,892	41.0%
Academic Support	\$ 218,442	9.6%
Student Services	\$ 309,703	13.6%
Institutional Support	\$ 652,116	28.7%
Operation and Maintenance of Plant	\$ 157,946	7.0%
<b>TOTAL EXPENSES BY PROGRAM</b>	<b>\$ 2,269,100</b>	<b>100.0%</b>

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: <b>BITTERROOT VALLEY COMMUNITY COLLEGE</b>		
ACCOUNTING FUNCTION: <b>INSTRUCTION</b>		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	12.75	96.2%
Contract Professional & Admin.	0.00	0.0%
Support Staff	0.25	1.9%
Other Employees (Workstudy)	0.25	1.9%
<b>TOTAL FTE'S</b>	<b>13.25</b>	<b>100.0%</b>
<b>PERSONAL SERVICES:</b>		
Contract Faculty	\$ 630,895	67.8%
Contract Professional & Admin.	\$ -	0.0%
Support Staff	\$ 4,800	0.5%
Other Employees (Workstudy)	\$ 1,267	0.1%
<b>Total Salaries</b>	<b>\$ 636,962</b>	<b>68.4%</b>
Employee Benefits	\$ 258,930	27.8%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 895,892</b>	<b>96.2%</b>
OPERATING EXPENSES:		
Contracted Services <sup>1</sup>	\$ 20,000	2.1%
Supplies and Materials	\$ 10,000	1.1%
Communications	\$ -	0.0%
Travel	\$ 2,000	0.2%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ -	0.0%
Total Operating Expenses	\$ 32,000	3.4%
Equipment and Capital	\$ 3,000	0.3%
Total Expenditures	\$ 930,892	100.0%
<b>TOTAL EXPENDITURES BY OBJECT</b>	<b>\$ 930,892</b>	<b>100.0%</b>

<sup>1</sup> Includes Learning Management System (\$20,000)

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: <b>ACADEMIC SUPPORT</b>		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0.0%
Contract Professional & Admin.	1.50	50.8%
Support Staff	1.45	49.2%
Other Employees (Workstudy)	0.00	0.0%
<b>TOTAL FTE'S</b>	<b>2.95</b>	<b>100.0%</b>
<b>PERSONAL SERVICES:</b>		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ 78,750	36.1%
Support Staff	\$ 56,875	26.0%
Other Employees (Workstudy)	\$ -	0.0%
<b>Total Salaries</b>	<b>\$ 135,625</b>	<b>62.1%</b>
Employee Benefits	\$ 71,317	32.6%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 206,942</b>	<b>94.7%</b>
OPERATING EXPENSES:		0.0%
Contracted Services <sup>1</sup>	\$ 5,000	2.3%
Supplies and Materials	\$ 3,000	1.4%
Communications	\$ -	0.0%
Travel	\$ 2,000	0.9%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ -	0.0%
Total Operating Expenses	\$ 10,000	4.6%
Equipment and Capital	\$ 1,500	0.7%
Total Expenditures	\$ 218,442	100.0%
<b>TOTAL EXPENDITURES BY OBJECT</b>	<b>\$ 218,442</b>	<b>100.0%</b>

<sup>1</sup> Includes Library Contract (\$5,000)

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: STUDENT SERVICES		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0.0%
Contract Professional & Admin.	0.50	9.5%
Support Staff	4.00	76.2%
Other Employees (Workstudy)	0.75	14.3%
<b>TOTAL FTE'S</b>	<b>5.25</b>	<b>100.0%</b>
<b>PERSONAL SERVICES:</b>		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ 26,250	8.5%
Support Staff	\$ 150,000	48.4%
Other Employees (Workstudy)	\$ 4,805	1.6%
<b>Total Salaries</b>	<b>\$ 181,055</b>	<b>58.5%</b>
Employee Benefits	\$ 108,649	35.1%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 289,703</b>	<b>93.5%</b>
OPERATING EXPENSES:		0.0%
Contracted Services <sup>1</sup>	\$ 3,500	1.1%
Supplies and Materials	\$ 6,000	1.9%
Communications	\$ 6,000	1.9%
Travel	\$ 3,000	1.0%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ -	0.0%
Total Operating Expenses	\$ 18,500	6.0%
Equipment and Capital	\$ 1,500	0.5%
Total Expenditures	\$ 309,703	100.0%
<b>TOTAL EXPENDITURES BY OBJECT</b>	<b>\$ 309,703</b>	<b>100.0%</b>

<sup>1</sup> Includes Financial Aid Verification contract (\$3,500)

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: INSTITUTIONAL SUPPORT		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0.0%
Contract Professional & Admin.	4.00	72.7%
Support Staff	1.25	22.7%
Other Employees (Workstudy)	0.25	4.5%
<b>TOTAL FTE'S</b>	<b>5.50</b>	<b>100.0%</b>
<b>PERSONAL SERVICES:</b>		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ 237,500	36.4%
Support Staff	\$ 38,750	5.9%
Other Employees (Workstudy)	\$ 1,716	0.3%
<b>Total Salaries</b>	<b>\$ 277,966</b>	<b>42.6%</b>
Employee Benefits	\$ 144,150	22.1%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 422,116</b>	<b>64.7%</b>
OPERATING EXPENSES:		0.0%
Contracted Services <sup>1</sup>	\$ 199,000	30.5%
Supplies and Materials	\$ 1,500	0.2%
Communications <sup>2</sup>	\$ 20,000	3.1%
Travel	\$ 5,000	0.8%
Rent	\$ -	0.0%
Utilities	\$ -	0.0%
Repair and Maintenance	\$ -	0.0%
Other	\$ 3,000	0.5%
Total Operating Expenses	\$ 228,500	35.0%
Equipment and Capital	\$ 1,500	0.2%
Total Expenditures	\$ 652,116	100.0%
<b>TOTAL EXPENDITURES BY OBJECT</b>	<b>\$ 652,116</b>	<b>100.0%</b>

<sup>1</sup> Includes Enterprise Management System (\$80,000), Web Management System (\$7,500), MS Office Employee Licenses (\$300), Student Email Client (\$1,200), Accreditation Costs (\$50,000), and Liability/Property/Umbrella Insurance (\$50,000 [+ \$25,000 covered by Designated Funds])

<sup>2</sup> Includes Telephones (\$4,000), Copier (\$4,000), Data/Internet (\$12,000 [+ \$6,000 covered by Designated Funds])

CURRENT UNRESTRICTED OPERATING ACCOUNT COMPARATIVE EXPENDITURES AND FTE DATA BY PROGRAM		
UNIT: BITTERROOT VALLEY COMMUNITY COLLEGE		
ACCOUNTING FUNCTION: OPERATION AND MAINTENANCE OF PLANT		
DESCRIPTION OF ACTIVITY	FY2024 BUDGETED	PERCENT
Contract Faculty	0.00	0%
Contract Professional & Admin.	0.00	0%
Support Staff	1.00	80%
Other Employees (Workstudy)	0.25	20%
<b>TOTAL FTE'S</b>	<b>1.25</b>	<b>100%</b>
<b>PERSONAL SERVICES:</b>		
Contract Faculty	\$ -	0.0%
Contract Professional & Admin.	\$ -	0.0%
Support Staff	\$ 30,000	19.0%
Other Employees (Workstudy)	\$ 1,716	1.1%
<b>Total Salaries</b>	<b>\$ 31,716</b>	<b>20.1%</b>
Employee Benefits	\$ 22,230	14.1%
<b>TOTAL PERSONAL SERVICES</b>	<b>\$ 53,946</b>	<b>34.2%</b>
<b>OPERATING EXPENSES:</b>		
Contracted Services	\$ 10,000	6.3%
Supplies and Materials	\$ 6,000	3.8%
Communications	\$ -	0.0%
Travel	\$ -	0.0%
Rent <sup>1</sup>	\$ 57,000	36.1%
Utilities <sup>2</sup>	\$ 23,000	14.6%
Repair and Maintenance	\$ 5,000	3.2%
Other	\$ -	0.0%
Total Operating Expenses	\$ 101,000	63.9%
Equipment and Capital	\$ 3,000	1.9%
Total Expenditures	\$ 157,946	100.0%
<b>TOTAL EXPENDITURES BY OBJECT</b>	<b>\$ 157,946</b>	<b>100.0%</b>

<sup>1</sup> \$20,000 in rent covered by Designated Funds

<sup>2</sup> \$10,000 in utilities covered by Designated Funds

Attachment G. Staffing calculation detail.

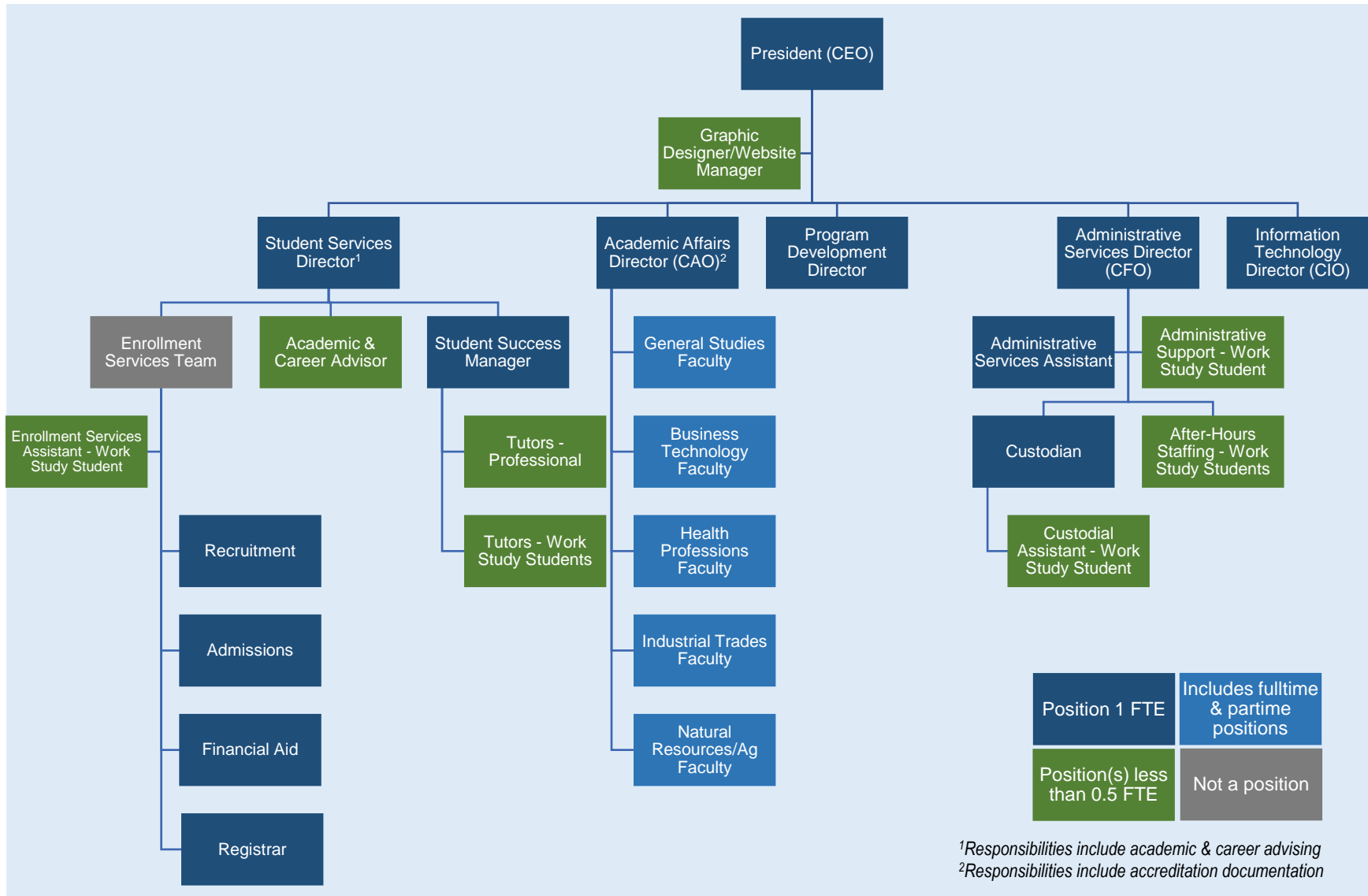
Personal Services	Base		Payroll	Health		Employee	Expense Total		
	FTE	Wage		Compensation	Deduct % <sup>1</sup>			Retire % <sup>2</sup>	Retire \$
<b>Instruction</b>									
Contract Faculty									
General Education									
Tenured	4.00	\$ 50,000	\$ 200,000	6.0%	16.82%	\$ 33,640	\$ 50,592	\$ 96,132	\$ 296,132
Adjunct	1.50	\$ 33,572	\$ 50,358	6.0%	16.82%	\$ 8,470	\$ -	\$ 11,467	\$ 61,825
Business & Technology									
Tenured	1.00	\$ 57,500	\$ 57,500	6.0%	16.82%	\$ 9,672	\$ 12,648	\$ 25,741	\$ 83,241
Adjunct	1.00	\$ 33,572	\$ 33,572	6.0%	16.82%	\$ 5,647	\$ -	\$ 7,644	\$ 41,216
Health Professions									
Tenured	1.00	\$ 65,000	\$ 65,000	6.0%	16.82%	\$ 10,933	\$ 12,648	\$ 27,449	\$ 92,449
Adjunct	0.50	\$ 33,572	\$ 16,786	6.0%	16.82%	\$ 2,823	\$ -	\$ 3,822	\$ 20,608
Industrial Technology									
Tenured	2.00	\$ 62,500	\$ 125,000	6.0%	16.82%	\$ 21,025	\$ 25,296	\$ 53,759	\$ 178,759
Adjunct	0.50	\$ 33,572	\$ 16,786	6.0%	16.82%	\$ 2,823	\$ -	\$ 3,822	\$ 20,608
Natural Resources									
Tenured	1.00	\$ 57,500	\$ 57,500	6.0%	16.82%	\$ 9,672	\$ 12,648	\$ 25,741	\$ 83,241
Adjunct	0.25	\$ 33,572	\$ 8,393	6.0%	16.82%	\$ 1,412	\$ -	\$ 1,911	\$ 10,304
	<b>12.75</b>		<b>\$ 630,895</b>					<b>\$ 257,487</b>	
Classified Staff									
Tutors	0.25	\$ 19,200	\$ 4,800	12.5%	16.82%	\$ 807	\$ -	\$ 1,405	\$ 6,205
	<b>0.25</b>		<b>\$ 4,800</b>					<b>\$ 1,405</b>	
Student Work Study									
Tutors	0.25	\$ 5,069	\$ 1,267	3.0%	0.00%	\$ -	\$ -	\$ 38	\$ 1,305
	<b>0.25</b>		<b>\$ 1,267</b>					<b>\$ 38</b>	
<b>Total Instruction</b>	<b>13.25</b>		<b>\$ 636,962</b>			<b>\$ 106,924</b>		<b>\$ 258,930</b>	<b>\$ 895,892</b>
<b>Academic Support</b>									
Contract Professional									
Program Development	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$ 80,515
Student Services (advising)	0.50	\$ 52,500	\$ 26,250	12.5%	16.82%	\$ 4,415	\$ 6,324	\$ 14,007	\$ 40,257
	<b>1.50</b>		<b>\$ 78,750</b>					<b>\$ 42,022</b>	
Classified Staff									
Student Success	1.00	\$ 40,000	\$ 40,000	12.5%	16.82%	\$ 6,728	\$ 12,648	\$ 24,356	\$ 64,356
Academic Advisor	0.45	\$ 37,500	\$ 16,875	12.5%	16.82%	\$ 2,838	\$ -	\$ 4,939	\$ 21,814
	<b>1.45</b>		<b>\$ 56,875</b>					<b>\$ 29,295</b>	
<b>Total Academic Support</b>	<b>2.95</b>		<b>\$ 135,625</b>			<b>\$22,812</b>		<b>\$ 71,317</b>	<b>\$ 206,942</b>
<b>Student Services</b>									
Contract Professional									
Student Services	0.50	\$ 52,500	\$ 26,250	12.5%	16.82%	\$ 4,415	\$ 6,324	\$ 14,007	\$ 40,257
	<b>0.50</b>		<b>\$ 26,250</b>					<b>\$ 14,007</b>	
Classified Staff									
Recruitment	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$ 61,124
Registrar	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$ 61,124
Financial Aid	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$ 61,124
Admissions	1.00	\$ 37,500	\$ 37,500	12.5%	16.82%	\$ 6,308	\$ 12,648	\$ 23,624	\$ 61,124
	<b>4.00</b>		<b>\$ 150,000</b>					<b>\$ 94,497</b>	
Student Work Study									
Enrollment Services Assistant	0.25	\$ 6,864	\$ 1,716	3.0%	0.00%	\$ 0	\$ -	\$ 51	\$ 1,767
After-Hours Staffing	0.50	\$ 6,178	\$ 3,089	3.0%	0.00%	\$ 0	\$ -	\$ 93	\$ 3,181
	<b>0.75</b>		<b>\$ 4,805</b>					<b>\$ 144</b>	
<b>Total Student Services</b>	<b>5.25</b>		<b>\$ 181,055</b>			<b>\$29,645</b>		<b>\$ 108,649</b>	<b>\$ 289,703</b>
<b>Institutional Support</b>									
Contract Professional									
President (CEO)	1.00	\$ 80,000	\$ 80,000	12.5%	16.82%	\$ 13,456	\$ 12,648	\$ 36,064	\$ 116,064
Academic Affairs (CAO)	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$ 80,515
Administrative Services (CFO)	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$ 80,515
Information Technology (CIO)	1.00	\$ 52,500	\$ 52,500	12.5%	16.82%	\$ 8,831	\$ 12,648	\$ 28,015	\$ 80,515
	<b>4.00</b>		<b>\$ 237,500</b>					<b>\$ 120,108</b>	
Classified Staff									
Administrative Services Assistant	1.00	\$ 30,000	\$ 30,000	12.5%	16.82%	\$ 5,046	\$ 12,648	\$ 21,429	\$ 51,429
Graphic Designer/Website Manager	0.25	\$ 35,000	\$ 8,750	12.5%	16.82%	\$ 1,472	\$ -	\$ 2,561	\$ 11,311
	<b>1.25</b>		<b>\$ 38,750</b>					<b>\$ 23,990</b>	
Student Work Study									
Administrative Support	0.25	\$ 6,864	\$ 1,716	3.0%	0.00%	\$ -	\$ -	\$ 51	\$ 1,767
	<b>0.25</b>		<b>\$ 1,716</b>					<b>\$ 51</b>	
<b>Total Institutional Support</b>	<b>5.50</b>		<b>\$ 277,966</b>			<b>\$ 46,465</b>		<b>\$ 144,150</b>	<b>\$ 422,116</b>
<b>Plant Operation/Maintenance</b>									
Classified Staff									
Custodial	1.00	\$ 30,000	\$ 30,000	15.0%	16.82%	\$ 5,046	\$ 12,648	\$ 22,179	\$ 52,179
	<b>1.00</b>		<b>\$ 30,000</b>					<b>\$ 22,179</b>	
Student Work Study									
Custodial	0.25	\$ 6,864	\$ 1,716	3.0%	0.00%	\$ -	\$ -	\$ 51	\$ 1,767
	<b>0.25</b>		<b>\$ 1,716</b>					<b>\$ 51</b>	
<b>Total Plant Operation/Maintenance</b>	<b>1.25</b>		<b>\$ 31,716</b>			<b>\$ 5,046</b>		<b>\$ 22,230</b>	<b>\$ 53,946</b>
<b>Total Personal Services</b>	<b>28.20</b>		<b>\$ 1,263,324</b>			<b>\$ 210,893</b>		<b>\$ 605,276</b>	<b>\$ 1,868,600</b>

<sup>1</sup> Payroll Deductions: Unemployment 0.45%; Workers Comp 0.5% (high rate at 3% for Plant & Student Workers); SL/AL/Term Assessment 11.5% (Professional & Classified), 5% (Faculty)

<sup>2</sup> Retirement: MCRE 1.45%, OASDI 6.2%, PERS/TRS 9.17%

<sup>3</sup> Health Insurance: MUS Health Insurance employer contribution is \$1054/mnth.

Attachment H. Organizational chart (for positions on Unrestricted Operating Account only).





Attachment I. Sample instructional contract.

---SAMPLE---  
**INTERGOVERNMENTAL SERVICE AGREEMENT  
BETWEEN  
OREGON COMMUNITY COLLEGE  
AND  
PORTLAND COMMUNITY COLLEGE**

THIS INTERGOVERNMENTAL AGREEMENT, as authorized by ORS 190.010, is entered into on the date of last signature below, between Oregon Community College, hereinafter referred to as "OCC", and Portland Community College, hereinafter referred to as "PCC".

WHEREAS, OCC and PCC desire to cooperate in enabling OCC to provide instructional and administrative services to patrons of the OCC service area, and to do so without requiring PCC patrons to subsidize the operation of the OCC district.

THEREFORE, the parties agree as follows:

I. OCC agrees to:

Adhere to and to comply with all applicable federal and state laws, PCC Board policies, Northwest Commission on Colleges and Universities (NWCCU) standards, and PCC's academic policies and procedures. PCC will periodically monitor compliance with all applicable laws, standards, policies, and procedures.

Comply with all applicable Oregon and United States statutes governing the employment relationship including, but not limited to, the Americans with Disabilities Act, the Family Medical Leave Acts, and the Fair Labor Standards Act.

Be solely responsible for hiring, employing, supervising, evaluating, and compensating faculty and staff to provide instruction, student support, and administrative services. The recruitment and selection of faculty and staff at OCC must be in compliance with the "Uniform Guidelines on Employee Selection Procedures" jointly adopted by the U.S. EEOC and the Office of Federal Contract Compliance. PCC will not provide and will not bill OCC for any workers compensation coverage. PCC will monitor all hiring processes and supervision practices periodically. All faculty hired by OCC must meet the qualifications established by PCC which will review the qualifications of all faculty on a periodic basis.

Be solely responsible for processing grievances filed by their students, administrators, faculty, and staff, for handling discrimination and affirmative action complaints, and for addressing violations of any of the above referenced employment laws. OCC agrees to hold PCC harmless for any violations or resulting complaints or claims relative to this section. PCC assumes no liability for these actions and any services provided by PCC at OCC's request relative to these actions are not covered in the agreement.

Consult with PCC regarding all contracts that have been or are being developed to provide instruction or other services related to instruction or instructional support

services at OCC for example, but not limited to, credit instruction and advanced placement. Contracts to provide training services to business and industry are exempted from this provision.

Reimburse PCC for any other services not described in this agreement and agreed to by both parties in writing before the service is performed. Billing for additional services will be done on a quarterly basis by the PCC Financial Services Office with appropriate documentation to justify billings for all additional services.

## II. PCC agrees to:

Provide the following comprehensive community college services to OCC in compliance with PCC Board policies and NWCCU accreditation standards.

### A. ACADEMIC SERVICES:

process and approve all OCC's curricular changes and new programs following PCC procedures;

periodically review instructor files to assure they are qualified in the subject areas they teach and to review implementation of the credit instructor approval policy;

periodically review hiring and evaluative procedures to assure compliance with established PCC procedures;

provide course content guides, the approved textbook and materials lists and other up-to-date curriculum information;

review OCC's instructional approval and evaluation procedures according to NWCCU standards;

provide opportunities for OCC, upon mutual agreement, to confer with PCC faculty and administrators for the purpose of providing technical assistance;

provide opportunities for OCC staff to participate in Subject Area Committees (SAC's), attend Educational Advisory Committee (EAC) meetings, and participate in other committees relevant to the agreement such as assessment and accreditation.

### B. ENROLLMENT SERVICES:

provide class schedule entry support;

maintain academic records for all OCC students attempting credit/CEU classes; provide transcript, transfer articulation, and related services;

provide financial aid services to OCC as described in the Financial Aid addendum to this agreement.

C. INSTITUTIONAL RESEARCH:

provide the programming for OCC to generate OCCURS and IPEDS data to prepare the reports OCC will submit to the Department of Community Colleges and Workforce Development.

D. LIBRARIES:

provide library support services as specified in the Library Services addendum

E. FINANCIAL SERVICES:

be responsible for billing OCC for services identified in paragraph VI and for all additional services in a timely manner;

provide appropriate documentation to justify billings for all additional services.

- III. In return for services rendered under paragraph II of this agreement, OCC will pay PCC an overhead charge of (xx) percent based on OCC's actual, annual costs for its full-time and part-time faculty (salary and fringe benefit payments), plus (xx) percent indirect charge on the value of this agreement.
- IV. Payments as identified in Paragraphs I and III will be made quarterly. Total payments to be made under this agreement as identified in the budget addendum will be estimated in advance each year, with adjustments to the estimate made on an annual basis. Final fiscal year billings for all costs will be provided no later than August 30.
- V. The budget agreement shall be adjusted annually by negotiations between OCC and PCC. Any changes in the financial arrangement will be agreed upon by both parties by December 15 prior to the July 1 effective date. The financial arrangement identified in this agreement will be validated annually by submitting a budget for approval. Appropriate signatures on the budget document will be required for validation.
- VI. The Vice President of Academic Services at PCC will have overall responsibility for administering this agreement and designating other staff, as needed, to carry out this agreement.
- VII. The parties each agree to indemnify and hold harmless the other for any damages, disbursements, and attorney fees which may result from the party's actions or failures to act.
- VIII. This agreement is intended to be continuous from year to year unless terminated in one of the following ways:
- A. Either party may terminate this agreement effective at the start of the next fiscal year by at least six (6) months notice in writing.
- B. The parties must agree annually in advance on all services and costs for each fiscal year. If they fail to agree, either party may give notice to terminate. During

the one hundred and eighty (180) day notice period, the agreement in effect for the ending fiscal year will be continued.

- C. If either party breaches this agreement, the other may terminate the agreement upon ninety (90) days written notice to the breaching party. This right is in addition to any other rights hereunder or by law.
  - D. By mutual agreement with mutually agreeable timelines.
- IX. The parties have entered into two addenda in conjunction with this Agreement, which are attached hereto and hereby incorporated by reference. The parties may agree on additional addenda provided that are reduced to writing and fully executed by both parties.
- X. Any amendment to this Agreement will not be effective unless reduced to writing and executed by both parties, except as otherwise provided in Paragraph V.

**LIBRARY SERVICES ADDENDUM A**  
**TO INTERGOVERNMENTAL SERVICE AGREEMENT BETWEEN**  
**OREGON COMMUNITY COLLEGE AND**  
**PORTLAND COMMUNITY COLLEGE**

As an Addendum to their Intergovernmental Service Agreement and in further compliance with the standards of the Northwest Commission on Colleges and Universities (NWCCU), Portland Community College and Oregon Community College agree to provide the following:

Portland Community College will:

1. Provide access to the PCC library system via the Internet;
2. Loan PCC's print and media collection in a timely manner and for loan periods specified by LRC systems plus shipping periods;
3. Provide full library service to students and staff of OCC who come to any PCC library.

Oregon Community College will:

1. Designate a space and a contact person to receive and distribute loaned library materials;
2. Provide all necessary hardware and software applications needed to access the Internet including any special applications needed to access PCC library services such as telnet;
3. Pay for costs associated with interlibrary loans for all materials, rental costs for films from outside vendors, etc., by establishing an account with PCC's delivery service at the Sylvania Bookstore and pay for replacement costs for lost materials;
4. Initiate a planning process to provide library services for all students enrolled at Oregon Community College by acquiring a collection at OCC, which in ten years would generate normal community college library use (10 circulations per FTE per year). On an interim basis, until a permanent facility is available, develop contracts or participate in consortium agreements to provide quality library services to meet Northwest Accreditation Association standards.

## **FINANCIAL AID ADDENDUM B**

### **TO INTERGOVERNMENTAL SERVICE AGREEMENT BETWEEN OREGON COMMUNITY COLLEGE AND PORTLAND COMMUNITY COLLEGE**

As an Addendum to their Intergovernmental Service Agreement and in further compliance with the standards of the Northwest Commission on Colleges and Universities (NWCCU), Portland Community College and Oregon Community College agree to provide the following:

Portland Community College:

1. Establish and maintain all official financial aid records for OCC students.
2. Supply all financial aid related forms and documents.
3. Process all financial aid applications and related forms.
4. Perform file evaluation and analysis (needs analysis, data verification, student eligibility determination, professional judgment decisions) for all aid applicants.
5. Determine award eligibility and award amounts for all aid applicants.
6. Certify all loan applications.
7. Disburse and deliver financial aid according to PCC's disbursement schedule and federal cash management regulations.
8. Perform all federal refund/repayment calculations for students who withdraw or stop attending classes.
9. Bill OCC for federal refunds and direct expenses incurred by PCC on behalf of OCC.
10. Approve all Federal Work-Study contracts (PCC is the designated institution).
11. Approve all consortium agreements with other institutions (PCC is the home institution) for purposes of awarding financial aid for concurrent enrollment.
12. Monitor satisfactory academic progress for all financial aid students.
13. Adjudicate all satisfactory academic progress, time frame, and financial aid appeals.
14. Provide financial aid advising/counseling by phone or e-mail.

Note: OCC students are not eligible for PCC Institutional Grants, nor are they eligible to charge books (using financial aid) at the PCC Bookstore.

15. Provide OCC with copies of all appropriate financial aid policies, procedures, and related documentation.
16. Provide financial aid training to OCC staff.
17. Provide query access to appropriate Banner financial aid screens.

Oregon Community College:

1. Disseminate financial aid information and forms to students and distribute financial aid checks to students.
2. Act as liaison between students and financial aid advisors at PCC.
3. Assist students in completing financial aid forms.
4. Maintain logging system to track all forms and documents submitted to PCC.
5. Conduct loan counseling (entrance and exit interviews) for all loan applicants according to PCC policies and federal regulations.
6. Conduct Federal Work-Study orientation sessions and make job referrals according to PCC policies and procedures.
7. Provide attendance verification and tuition account information to PCC for financial aid students who withdraw or stop attending classes by submitting the last date of attendance
8. Access Banner financial aid screens through data link to assist students in determining financial aid status.
9. Return all financial aid checks (aid canceled, student withdrawal, aid revision, etc.) according to PCC policies and federal cash management regulations.
10. Conduct financial aid workshops for students and parents according to PCC policies and procedures.
11. Attend OASFAA/OSSC financial aid training workshops.
12. Attend PCC financial aid training sessions.
13. Reduce or collect on OCC students who have been shown to be in default.